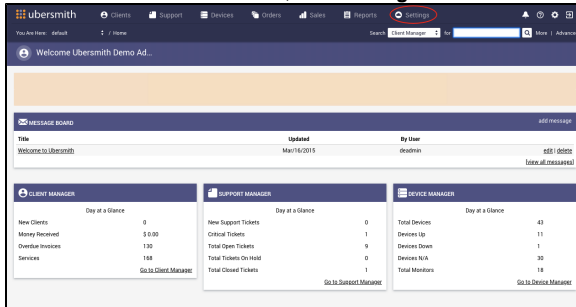


Adding Contact Roles

Contact roles allow you to manage your client's contacts authorization, to specify the areas they are allowed to view or edit. You can assign roles to groups of contacts as a unit, such as billing, sales, support, and so on.

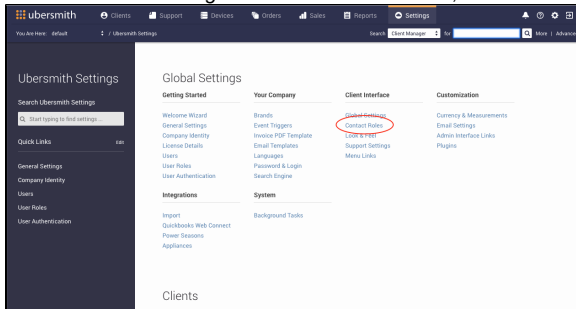
Access the Contact Roles Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

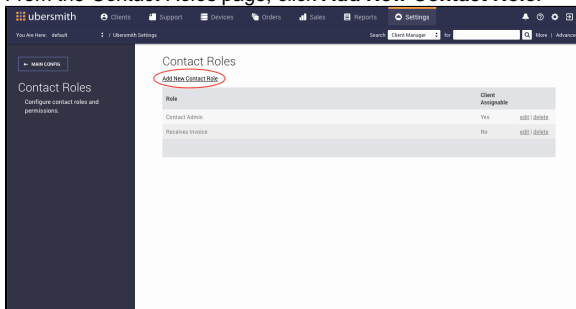
2. From the *Global Settings – Client Interface* section, click **Contact Roles**.



The *Contact Roles* page appears.

Complete the Contact Role Page

- From the *Contact Roles* page, click **Add New Contact Role**.



The *Contact Role* page appears.

Complete the Name Tab

1. In the **Role Name** field, enter the name of the role you want to create.
2. In the **Description** field, enter a description of what the role properties will be.

On this page:

On this page:

- [Access the Contact Roles Page](#)
- [Complete the Contact Role Page](#)
- [Complete the Name Tab](#)
- [Complete the Permissions Tab](#)
- [Related Topics](#)

3. In the **Client Assignable** field, select **Yes** if you want your clients to be able to assign this role to a contact.

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Contact Role

Role Name: Accounts Receivable

Description: gives the user rights to the following functions in the Client Portal

Client Assignable: ☒ Yes ☐ No

Save Cancel

Complete the Permissions Tab

The Permissions grid contains each distinct area in the Client Portal, that can be expanded to display each area's functions, such as the Client Profile. Permissions available for each area are view, create, update and delete. None and Inherit are system defaults that start the user with no rights.

1. Click the *Permissions* tab.

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Contact Role

Permissions

Filter resources: (shows inherited value)

Resources	View	Create	Update	Delete
Client Portal	Inherit	Inherit	Inherit	Inherit
Client Profile	Inherit	Inherit	Inherit	Inherit
Billing & Services	Inherit	Inherit	Inherit	Inherit
Reports	Inherit	Inherit	Inherit	Inherit
Domain Management	Inherit	Inherit	Inherit	Inherit
Support	Inherit	Inherit	Inherit	Inherit
Device Manager	Inherit	Inherit	Inherit	Inherit
More Links	Inherit			

Save Cancel

The *Permissions* grid appears.

2. Expand each area in the *Resources* column to access each area's functions. See [Client and Contact Permissions](#) for more information.
3. Select the appropriate rights to assign to the role, for each area's *View*, *Create*, *Update* and *Delete* columns. **Allow** gives the user access and **Deny** gives the user no access.



Note

Some permissions are superseded by rights granted or denied in the *Client Portal*. See [Configuring Client Interface Global Settings](#) for more information.

4. Click **Save**.

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Contact Role

Permissions

Filter resources: (shows inherited value)

Resources	View	Create	Update	Delete
Client Portal	Inherit	Inherit	Inherit	Inherit
Client Profile	Inherit	Inherit	Inherit	Inherit
Billing & Services	Inherit	Inherit	Inherit	Inherit
Services	Allow	Allow	Allow	Allow
Services	Allow	Allow	Allow	Deny
Tax Exemptions	Allow	Allow	Allow	Allow
Credits	Allow	Allow	Allow	Allow
Orders	Allow	Allow	Allow	Allow

Save Cancel

Related Topics

[Adding Clients](#)

[Adding Contacts](#)

[Managing Clients](#)

[Managing Contacts](#)